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Class Specifications
for the Class:

SUPERVISING TAX SPECIALIST

Class Distinguishers:

Complexity: This class reflects responsibility for planning, directing, coordinating and supervising the work of lower level tax specialists involved in developing and issuing letter rulings, i.e., written responses to highly technical taxpayer inquiries; developing and revising tax return forms and instructions; developing and conducting informational and educational programs for the public, and internal training programs for departmental taxpayer services personnel who respond to technical taxpayer inquiries; and approving/disapproving taxpayer applications for exemption from conveyance tax and payment of general excise tax. The work involves reviewing highly technical work for correctness and ensuring uniform interpretation and application of tax laws, rules, regulations and legal opinions, court decisions, etc.; evaluating informational and educational programs for effectiveness; and ensuring that division personnel responsible for taxpayer informational services are properly trained and updated on tax laws, rules and regulations.

Personal Contacts: Personal contacts include taxpayers, tax return preparers, attorneys, certified public accountants, and others, to respond to highly technical tax matter inquiries; media representatives to deliver press releases; consultations with the departmental Rules Office to maintain uniformity in interpreting and applying tax laws; and departmental personnel to gather pertinent information for the development or revision of tax return forms and instructions.

Supervision Exercised: The position in this class supervises a staff of tax specialists.

Supervision Received: The position works under the general supervision of the branch chief, consulting on highly sensitive or controversial informational tax matters; and in accordance with broad guidelines provided by the departmental Rules Office.

Full Performance Knowledge and Abilities: *(Knowledge and abilities required for full performance in this class.)*

Knowledge of: Principles and practices of supervision; State and related federal tax laws, rules and regulations; court decisions and legal tax opinions of the Attorney General; departmental policies, procedures and operations; basic tax accounting concepts and methodologies; various tax return forms and filing requirements; research and problem solving methods and techniques; and methods of editing and writing informational tax materials.

Ability to: Supervise the work of lower level tax specialists; plan, direct and coordinate taxation technical and training activities; interpret and apply tax laws, rules and regulations; analyze facts and make sound decisions; develop tax return forms; present technical information in a clear and concise manner, orally and in writing; speak before the media; and establish and maintain effective working relationships with others.

Examples of Duties: *(The position may not be assigned all of the duties listed, nor do the examples necessarily include all the duties that may be assigned. The omission of specific statements does not preclude management from assigning such duties if such duties are a logical assignment for the position. The classification of a position should not be based solely on the examples of duties performed.)*

1. Plan, direct, coordinate and supervise the work of lower level tax specialists involved with the issuance of letter rulings; development of educational and informational programs for the public, and internal training programs for branch and other departmental personnel responding to public inquiries on technical tax issues; and development of new and revised tax return forms and instructions.
2. Plan and assign work according to level of complexity; establish work priorities; and ensure that assignments are carried out in concert with overall direction of the branch.
3. Review work of subordinates for completeness and technical correctness.
4. Discuss with and/or counsel employees on their work performance.
5. Recommend approval of various personnel actions.
6. Evaluate the effectiveness of educational and informational programs.

7. Ensure that information regarding tax laws, rules and regulations, policy statements, etc., are distributed to divisional personnel responsible for dissemination of taxpayer information.
8. Coordinate and disseminate mass media information through various media.
9. Serve as chairperson of the department's Forms Control Committee which is responsible for reviewing and providing input on all new and revised tax return forms.
10. Coordinate assistance to the Licensing and Clearance Section and Information and Services Section for consistency in informational taxpayer services and resolution of taxpayer problems.
11. Evaluate workload resources, and make planning and budgetary recommendations to the branch chief.

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This is the first specification for the new class
SUPERVISING TAX SPECIALIST.

Effective Date: 4/7/99

DATE APPROVED: 4/7/99

/s/ Diana H. Kaapu
MIKE MCCARTNEY
Director of Human Resources Development